**ABERDEEN CITIZENS ADVICE BUREAU**

**Money Advice Worker**

**Job Description**

**Key responsibilities**

* To deliver advice and support on money advice and income maximisation at outreach venues in various locations in Aberdeen.
* To attend to clients on the phone, by email and in person, using sensitive listening and questioning skills.
* To explore clients’ circumstances, support needs and access channel preferences considering language barriers, accessibility needs, and issues around digital access and ability.
* To gather and consider all the information provided by a client and prioritise their needs as appropriate and refer on to other specialist services as required.
* To undertake casework on behalf of clients particularly in relation to money advice, debt advice and income maximisation. This includes preparing financial statements, completing required paperwork for various debt remedies; and negotiating and corresponding on behalf of clients as appropriate.
* To undertake any necessary training and casework to become an Approved Money Adviser.
* To co-ordinate and organise appointments/drop-in at outreach as necessary.
* To promptly deal with any client emergencies.
* To gather and record all client profile information required for statistical returns.
* To liaise where appropriate with bureau staff and other relevant agencies.
* To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
* To adhere to Bureau principles and to ensure that all work meets quality standards and the requirements of the funder(s).
* To contribute case studies and other relevant information for reporting to funder(s) as required.
* Contribute to overall efficiency and quality of processes and procedures.
* Contribute to internal and external research and monitoring.
* Contribute to the training and development of generalist advisers.
* Carry out other duties as specified by the Manager and required by the needs of the post.
* Present a positive image of the Bureau at all times.
* Form effective working relations and networking with other organisations and stakeholders ensuring collaborative approach in service delivery.
* Assist in identifying personal strengths, weaknesses and personal training needs.
* Attend in-house and external training courses as appropriate.
* Attend team and staff meeting as required, including feeding back of any legislative or other changes to colleagues and the wider team.

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonably requested by the Manager.

**Person Specification – Money Advice Worker**

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| Qualifications (Essential) | * Educated to National 5 grade (or equivalent) including English and Maths |
| Experience (Essential)  Experience (Desirable) | * Experience of working with people with multiple and complex needs * Experience of managing a complex caseload * Previous paid or unpaid work in an advice-giving field * Experience of working with volunteers as either a volunteer or paid staff member * Completion of the Citizens Advice Bureau Adviser Training Programme |
| Skills & Attributes (Essential) | * Able to communicate effectively with people in writing and verbally, including by telephone * Ability to work under pressure and using own initiative * Able to write clearly and accurately, including drafting routine correspondence and taking notes of meetings * Good planning and organisational skills * Demonstrate a competent knowledge of Microsoft applications and an ability to learn and use a range of other software on a daily basis * Ability to maintain and monitor client records * High level of numeracy and literacy, with an ability to capture and collate statistical information for analysis * Good interview and diagnostic skills * Ability to identify potential safeguarding issues |
| Values & Attitudes (Essential) | * Ability to work without close supervision, prioritise own work and meet deadlines * Commitment to team working approach * Able to empathise with clients while ensuring required action is advised, including directing clients to other sources of advice or support * Good interpersonal skills in a customer facing role * An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of Bureau * Willingness to learn and develop new skills |
| Knowledge (Essential)  Knowledge (Desirable) | * A current and sound working knowledge of: * Debt and money advice * Income maximisation & budgeting * A current and sound working knowledge of: * Welfare benefits including Universal Credit * Housing * Energy related advice * Understanding of the issues facing clients and how it affects individuals and their families |
| Other (Essential) | * Dependable, reliable, trustworthy and approachable * Able to work flexible hours as required by the service and the needs of the clients and the bureau * Possess an organised approach to all areas of work, including recording and filing of work, while being cognisant of the need for discretion and security of information * Flexible approach to tasks and a positive attitude * Able to work within required statutory standards * Support the principal of volunteerism * Clear understanding of the excellence in service delivery * Ability to travel around Aberdeen City |